

Special Section for School and Child Care Users

This special section for school and child care users covers the registry software application functionality that is only available to these kinds of users. Most school and child care providers may view record which is known as “Read-only” access to SDIR. That is, users can search for records, view the records and print out certain forms and reports. However, some schools may be given access to SDIR to enter student health information once they obtain parent or the individual student (if adult or emancipated) written consent.

Sections 1 & 2 of the Read-only User Manual explain how to login and search for records in the registry, this section covers the following functionality:

- How to enter disease history,
- How to enter waivers/exemptions,
- How to print out the California School Immunization Record (CSIR) also known as the Blue Card,
- How to produce a School Roster Report,
- How to enter CHDP Annual School Exam date and result,
- How to enter the Oral Health Exam date and result.
- Then, after creating the School Roster, the guide explains how to print:
 - the Kindergarten Immunization Assessment Work Sheet and the Immunization Assessment of Kindergarten Students-Annual Report, School Summary Sheet (PM 236 5/07)
 - the Worksheet for the Annual Immunization Report on Children enrolled in Child Care Center and the Annual Immunization Report on Children enrolled in Child Care Centers (CDPH 8018 5/07)

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How to Add Disease History

- ① Click on the IMMUNIZATION tab
- ② Click on “Disease History”

SDIR - Immunization - Microsoft Internet Explorer

Admin | CS SDIR | Standard | Training Clinic
GONZALES, MARIA | 08/24/2003 | 3 years 0 months

SEARCH DEMOGRAPHICS **IMMUNIZATION** SCREENINGS ACTIVITY LOG SAVE UTILITY LOGOUT

ALL RECORDS VALID RECORDS ONLY

4 Records (Unique Only) Add 12 from Inventory or History

Vaccine	Date	Dose	Body Site	Mfg	Brand Name	Lot #	VIS Date	Vaccinator	Other Provider
POLIO									
IPV	08/15/2004	1	Unknown						<input checked="" type="checkbox"/>
DTP									
DTaP	08/25/2004	1	LD-IM	GRE	123456 VFC			Barnhart, Alejandra, MD	<input type="checkbox"/>
MMR									
MMR	08/25/2004	1	RL-SQ	MSD	12345			Barnhart, Alejandra, MD	<input type="checkbox"/>
Hib									
Hib	08/25/2004	1	RD-IM	AB	777888999			Barnhart, Alejandra, MD	<input type="checkbox"/>

PRINT PRINT CALIFORNIA IMMUNIZATION RECORD

Vaccine Forecast Due 08/24/2003
IPV
DTaP
Hib
Hep B
Vancella
Hep A
PCV 7

Next Due Date
08/24/2003
UPDATE
Sunday
August 2003
S M T W T F S
27 28 29 30 31 1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
31 1 2 3 4 5 6

- ③ Click on “Add New”
- ④ Select “Disease”
- ⑤ Edit date and/or add Comment
(Today’s date will automatically be entered in the Comment section. Click in the Comment section to edit the date. If you change the date, make certain you **don’t change its format**. If you need to make additional comments, begin typing *after* the date.)
- ⑥ Click on “Insert”

SDIR - Immunization - Microsoft Internet Explorer

Admin | CS SDIR | Standard | Training Clinic
GONZALES, MARIA | 08/24/2003 | 3 years 0 months

SEARCH DEMOGRAPHICS IMMUNIZATION SCREENINGS ACTIVITY LOG SAVE UTILITY LOGOUT

Immunization Disease History

0 Records

Disease	Comment
chickenpox	09/01/2006 Child had disease on this date per mom.

INSERT CANCEL

If disease history has been entered, you will see a check mark next to the word “Disease History”

SDIR - Immunization - Microsoft Internet Explorer

Admin | CS SDIR | Standard | Training Clinic
GONZALES, MARIA | 08/24/2003 | 3 years 0 months

SEARCH DEMOGRAPHICS IMMUNIZATION SCREENINGS ACTIVITY LOG SAVE UTILITY LOGOUT

Immunization Disease History

4 Records (Unique Only) Add 12 from Inventory or History

Vaccine	Date	Dose	Body Site	Mfg	Brand Name	Lot #	VIS Date	Vaccinator	Other Provider
POLIO									
IPV	08/15/2004	1	Unknown						<input checked="" type="checkbox"/>
DTP									
DTaP	08/25/2004	1	LD-IM	GRE	123456 VFC			Barnhart, Alejandra, MD	<input type="checkbox"/>
MMR									
MMR	08/25/2004	1	RL-SQ	MSD	12345			Barnhart, Alejandra, MD	<input type="checkbox"/>
Hib									
Hib	08/25/2004	1	RD-IM	AB	777888999			Barnhart, Alejandra, MD	<input type="checkbox"/>

PRINT PRINT CALIFORNIA IMMUNIZATION RECORD

Vaccine Forecast Due 08/24/2003
IPV
DTaP
Hib
Hep B
Vancella
Hep A
PCV 7

Next Due Date
08/24/2003
UPDATE
Sunday
August 2003
S M T W T F S
27 28 29 30 31 1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
31 1 2 3 4 5 6

How to Document a Vaccine Waiver (Exemption)

Vaccine waivers are allowed for medical, religious and philosophical reasons.

The waivers can be permanent or temporary.

There are two ways to select waivers: by vaccine **group** (e.g., MMR)
or by a specific **vaccine** (Varicella).

If a specific vaccine is selected and it is part of a combination vaccine (e.g., measles),
the remaining vaccines of the group can still be forecasted.

① Click on the “Waivers” link

The screenshot shows the SDIR - Immunization interface in Microsoft Internet Explorer. The top navigation bar includes links for SEARCH, DEMOGRAPHICS, IMMUNIZATION, TO, ACTIVITY LOG, SAVE, UTILITY, and LOGOUT. The main content area displays a table of immunization records for GONZALES, MARIA, born 08/24/2003, 3 years 0 months old. The table has columns for Vaccine, Date, Dose, Body Site, Mfg, Brand Name, Lot #, VIS Date, and Vaccinator. Records for POLIO, DTP, MMR, and HIB are shown. A 'Waivers' link is highlighted in the top right corner of the main content area.

② Click on “Add New” (this will only appear if you are working on a home record.)

③ Click on the drop-down box to select the list of VACCINES you want to waive.

Note: if a specific vaccine is selected and it is part of a combination vaccine (e.g. measles), the remaining vaccines of the group can still be forecasted.

The screenshot shows the SDIR - Immunization interface in Microsoft Internet Explorer. The top navigation bar includes links for SEARCH, DEMOGRAPHICS, IMMUNIZATION, SCREENINGS, ACTIVITY LOG, SAVE, UTILITY, and LOGOUT. The main content area displays a table of immunization records for GONZALES, MARIA, born 08/24/2003, 3 years 0 months old. The table has columns for vaccine name, group, type, permanent, start date, end date, and Comment. A 'Waivers' link is highlighted in the top right corner of the main content area. Below the table, there is a form for adding a new waiver. The 'Vaccine' dropdown menu is open, showing a list of vaccine groups: POLIO, DTP, MMR, HIB, and HEP B. The 'Add New' button is circled in red. The 'Waiver Type' dropdown menu is set to 'Medical'. The 'Permanent' checkbox is unchecked. The 'Start Date' is set to 09/01/2006. The 'End Date' is empty.

④ Select the type of waiver or exemption that is appropriate:

- Medical
- Philosophical*
- Religious*

Check the box next to “Permanent” if the waiver is not temporary.

If the waiver is temporary, enter in a “Start Date” and an “End Date”. You may also enter any notes in the comment box.

* “All immunizations” can be selected.

SDIR - Immunization - Microsoft Internet Explorer

Admin | CS SDIR | Standard | Training Clinic
GONZALES, MARIA | 08/24/2003 | 3 years 0 months

Immunization

0 Records

vaccine name	group	type	permanent	start date	end date	Comment
Add New						

Waivers

④

Waiver Type: Medical (selected), Philosophical, Religious

Permanent: ☐ Start Date: End Date:

Comment:

⑤ INSERT CANCEL

⑤ Click “Insert”. You will then return to the Immunization screen and see a green check mark next to the word “Waiver”.

SDIR - Immunization - Microsoft Internet Explorer

Admin | CS SDIR | Standard | Training Clinic
GONZALES, MARIA | 08/24/2003 | 3 years 0 months

Immunization

ALL RECORDS VALID RECORDS ONLY

4 Records (Unique Only)

Vaccine	Date	Dose	Body Site	Mfg	Brand Name	Lot #	VIS Date	Vaccinator	Other Provider
POLIO	08/15/2004	1	Unknown						<input checked="" type="checkbox"/>
DTP	08/25/2004	1	LD-IM	GRE	123456 VFC			Barnhart, Alejandra, MD	<input type="checkbox"/>
MMR	08/25/2004	1	RL-SQ	MSD	12345			Barnhart, Alejandra, MD	<input type="checkbox"/>
Hib	08/25/2004	1	RD-IM	AB	777888999			Barnhart, Alejandra, MD	<input type="checkbox"/>

⑤

Waivers (checked), Disease History, Other Provider

Next Due Date: 09/01/2007

PRINT PRINT CALIFORNIA IMMUNIZATION RECORD

How to View and Print the School Immunization Record (Blue Card)

California School Immunization Record or Blue Card:

Now school users can print out a copy of the California School Immunization Record, commonly known as the “Blue Card”. School users should go to the bottom of the Immunization Screen and click on the “print to blue card” button.

SDIR - Immunization - Microsoft Internet Explorer

SEARCH DEMOGRAPHICS IMMUNIZATION SCREENINGS ACTIVITY LOG SAVE UTILITY LOGOUT

Admin | AKC AKC | Sweetwater Union High School Dist | Chula Vista Middle School
USER, MANUEL | 01/01/2001 | 5 years 8 months

ALL RECORDS VALID RECORDS ONLY

10 Records (Unique Only)

Vaccine	Date	Dose	Body Site	Mfg	Brand Name	Lot #	VIS Date	Vaccinator	Other Provider
POLIO									
IPV	09/09/2001	1	Unknown						<input checked="" type="checkbox"/>
IPV	09/09/2002	2	Unknown						<input checked="" type="checkbox"/>
IPV	03/25/2004	3	LA-SQ	PMC		1234		Cecilia Taboraa, RN	<input checked="" type="checkbox"/>
DTP									
DTaP	09/09/2001	1	Unknown						<input checked="" type="checkbox"/>
DTaP	09/09/2002	2	Unknown						<input checked="" type="checkbox"/>
MMR									
MMR	09/09/2001	1	Unknown						<input checked="" type="checkbox"/>
MMR	03/25/2004	1	LA-SQ	MSD		12245		Cecilia Taboraa, RN	<input checked="" type="checkbox"/>
HIB									
Hib	09/09/2001	1	Unknown						<input checked="" type="checkbox"/>
HEP B									
Hep B-adol or ped Child	09/09/2001	1	Unknown						<input checked="" type="checkbox"/>
PNEUMO									
PCV 7	09/09/2001	1	Unknown		PREVNAR				<input checked="" type="checkbox"/>

PRINT PRINT CALIFORNIA IMMUNIZATION RECORD PRINT TO BLUE CARD

++ : Extra

This will open the following screen:

Important: The list of immunizations that the child had in the immunization screen will be transferred over to the blue card once the user click to “print to blue card” button. Only the total number of immunizations (which may be valid and invalid shots) that the CA school law* requires will be printed out of the blue card, no matter how many list of individual immunizations that the child has on the CIR. For example: If the child had 6 IPV’s indicated in the immunization screen, only 4 IPV’s will be transferred over to the blue card.

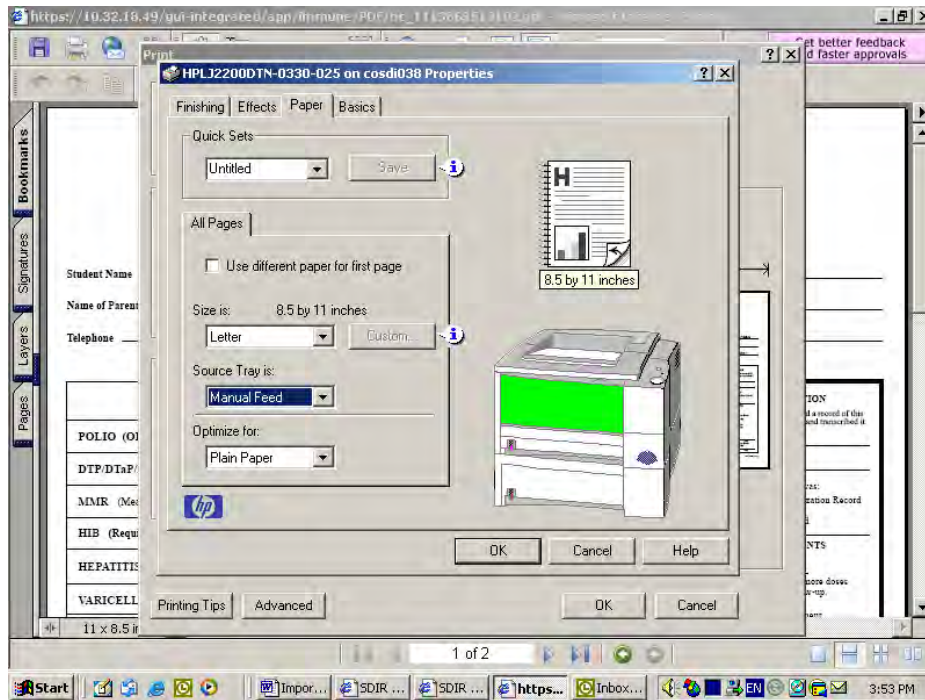
*California Immunization Handbook for Schools and Child Care Providers: <http://www.dhs.ca.gov/ps/dcdc/izgroup/pdf/HandbookText.pdf>

Blue Card Printing Guidelines & Tips:

- ✓ The blue card should be printed on a light blue paper.
- ✓ The blue card can be a two pages or double-sided document.

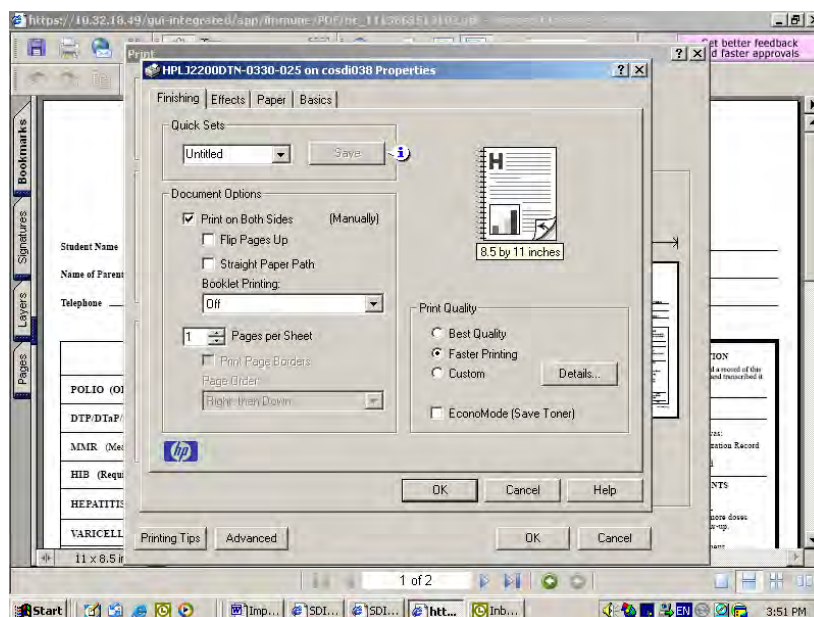
Printer set-up:

To make a two page blue card: Place the blue paper in the manual tray. Select “Manual Feed” for the source tray.

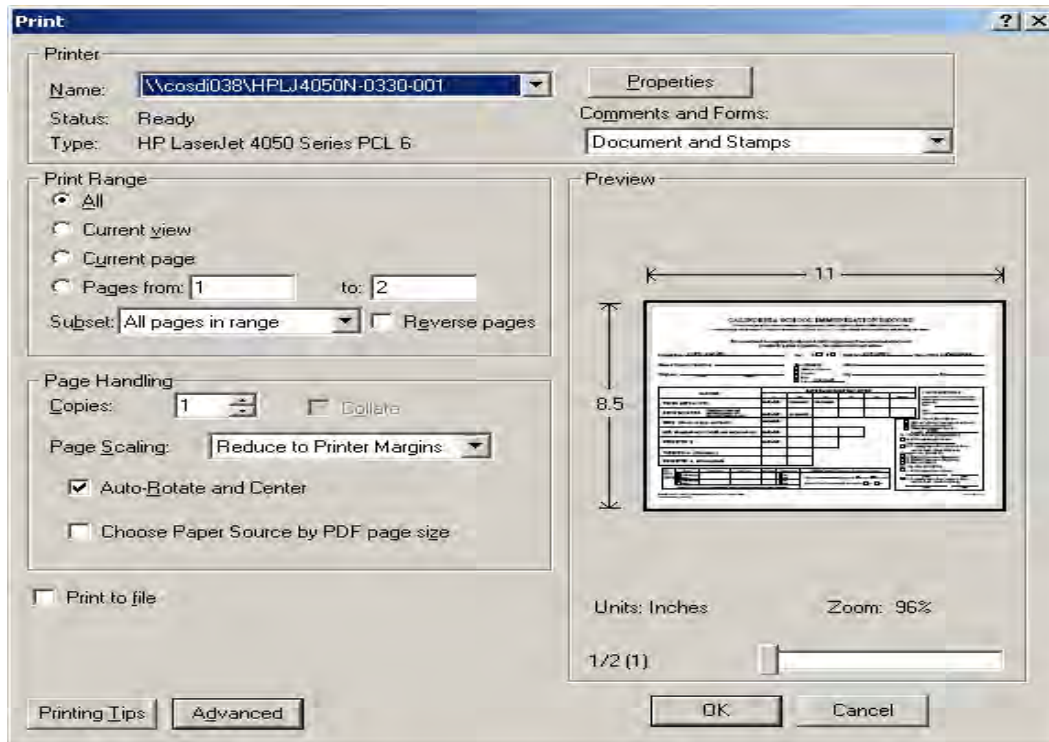


To make a double-sided blue card— There are two options:

- If your printer can do double sided pages. Set the printer properties for document options to “print on both sides”



- c) Double-sided but printed one page at a time. To print out one page at a time: click on printer and select current page. Print it and then turn it over and reinsert in the printer. Print the other page.



How to use the School Roster Report

The purpose of the school roster is that it will group together in a report format, children's records in the registry and then display their immunizations that are in the SDIR. New entries (patient records and their immunizations) to the registry can be entered manually by the school user.

The childcare/school roster report has dual functionality: that is, the data can be entered by the user by either searching for and selecting or entering a new student in the roster. The 2nd way that the roster report can be used is through childcare/school users using an import batch file function that will accept common text, tab, or comma delimited files which the registry will review and then identify an existing patient immunization records group them into the roster. Rosters can be named by indicating the school, grade, and teacher.

There are two ways to use the school roster report, the instructions are therefore separated into two sections 1)Searching and entering names and immunizations, 2)Uploading a batch file of names and have the registry automatically compile the roster report

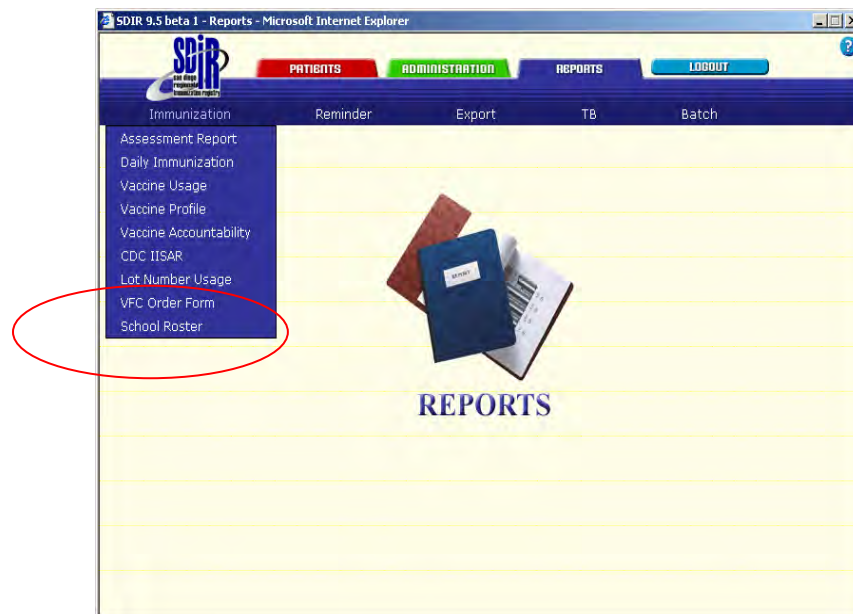
A question and answer section addressing the functionality of the school roster follows the detailed instructions.

Steps to create and use the school roster report:

Start here for either of the methods

1. Go to the Utility Tab, click on Reports and then click on Immunization.

2. Find and click on School Roster.



Method 1: Search and enter individual names and immunization information:

1. Click on the New Roster under the Roster List.
2. Start entering names and information in each row .

Note: you can avoid having to enter names individually if you have a **.tab delimited file*** already created. Simply enter a roster name and upload the file using the browse button. This is Method 2 and is explained starting on the next page (4.11).



1. When finished entering new names, click on Save.
2. Then to create the Roster Report, click on Merge Patients.

The application will check the registry for the records of immunizations for those students.

If you do not want to run the Roster Report, then click on the 'Done' button.

6. You can go back to this roster report to enter or edit names by clicking on the appropriate roster name.

Roster List				
Date	Roster Name	# of Students	Worksheets	Forms
07/21/2008	Chargers	5	Child Care Kindergarten	Child Care Form Kindergarten Summary delete
07/21/2008	chargers2	14	Child Care Kindergarten	Child Care Form Kindergarten Summary delete

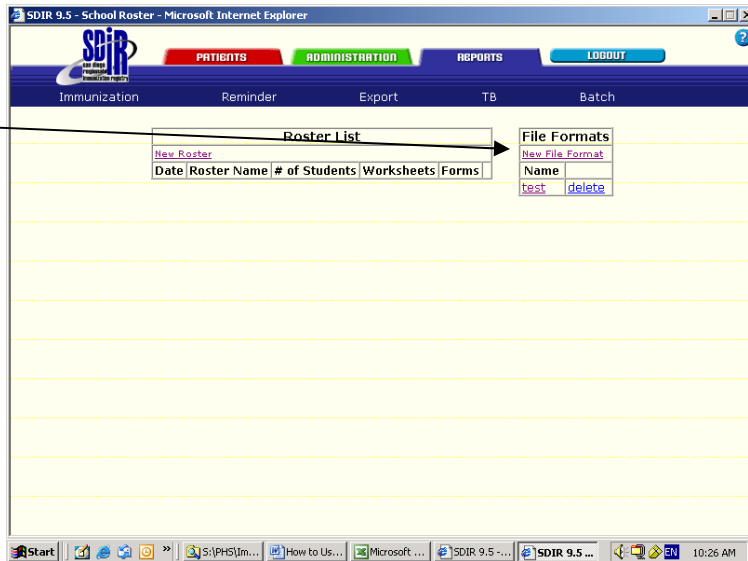
Method 2. Upload an Excel file with student names and other information

If you have an Excel or other “flat” file (a file made up of multiple records each one with on its own line or row) list of names and demographic information, you need to follow these steps:

- Below is an example of a tab delimited file using Excel which organizes the information in a column and row format. Note that there are header names at the top of each column. **Save the Excel file as .tab (tab delimited) file on your computer with a file name and in a folder that you will be able to locate later.**

	A	B	C	D	E	F	G	H
	Last Name	First Name	Date of Birth	Gender	Street Address Line 1	Zip code	City	State
2	JONES	ANDY	29-Aug-2005	M	15433AA S MISSION RD	92404	FALLBROOK	CA
3	JONES	ASTON	30-Aug-2005	F	15433AA S MISSION RD	92404	FALLBROOK	CA
4	JONES	BAILEY	31-Aug-2005	F	15433AA S MISSION RD	92404	FALLBROOK	CA
5	JONES	MICHAEL	1-Sep-2005	M	15433AA S MISSION RD	92404	FALLBROOK	CA
6	JONES	LENNY	2-Sep-2005	M	15433AA S MISSION RD	92404	FALLBROOK	CA
7	JONES	ALBERT	3-Sep-2005	M	15433AA S MISSION RD	92404	FALLBROOK	CA
8	JONES	BRADY	4-Sep-2005	M	15433AA S MISSION RD	92404	FALLBROOK	CA
9	JONES	ANGELA	5-Sep-2005	F	15433AA S MISSION RD	92404	FALLBROOK	CA
10	JONES	ANGELINA	6-Sep-2005	F	15433AA S MISSION RD	92404	FALLBROOK	CA
11	JONES	ANGELO	7-Sep-2005	M	15433AA S MISSION RD	92404	FALLBROOK	CA

Click on the New File Format link in the File Format section to the right of your screen.



The Roster File Configuration screen will appear. This screen is used to create a template that can be used for the tab delimited file that contains the list of student names. The next step is to fill in the blanks to create the new configuration file that matches the tab delimited file.

Give the file format a configuration name. The example is SD High School for the configuration name.

Leave the column separator and row separator blank for now.

If there are headers (column names) in your Excel file, click the “Use Headers” box.

Look at your tab delimited file and match the columns in your tab delimited file with the column names on the roster screen. For example, Column 1 in the sample tab delimited file is Last Name so in the roster screen for Last Name enter the number 1 and so on until all of the entries in the roster screen have been filled by the appropriate number on the file columns that will be uploaded. Note: the tab delimited file may contain additional fields that do not need to be uploaded. Only number the fields that will be uploaded. Click on the *Save* button to save the new configuration file.

The screenshot shows the SDIR interface with the following components:

- Navigation Bar:** PATIENTS (red), ADMINISTRATION (green), REPORTS (blue), and LOGOUT (blue).
- Sub-navigation Bar:** Immunization, Reminder, Export, TB, and Batch.
- Roster List Table:**

Date	Roster Name	# of Students	Worksheets	Forms	
07/21/2008	Chargers	5	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete
07/21/2008	MannyTEST	1	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete
07/21/2008	chargers2	15	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete
07/22/2008	Nancyschool	9	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete
07/22/2008	Lakers	17	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete
- File Formats Table:**

Name	
SD High school	delete

The new SD High School configuration file format will be found in the file formats table (left of the screen). This file format will be used later in uploading/creating a new roster.

Select *New Roster* (See the words on the upper left under Roster List) and the screen below will appear.

The screenshot shows the SDIR Roster Edit screen with the following components:

- Navigation Bar:** PATIENTS (red), ADMINISTRATION (green), REPORTS (blue), and LOGOUT (blue).
- Sub-navigation Bar:** Immunization, Reminder, Export, TB, and Batch.
- Roster Edit Form:**
 - Roster Name:**
 - Import File:** [Browse...](#)
 - using:** SD High school (dropdown menu)
 - Buttons:** [Save](#) [Done](#)
- Student Data Table:**

	Last Name	First Name	Middle	Dob	Gender	Mother Maiden	Address	City	State	Zip
X										
X										
X										
X										
X										
X										
X										
X										
X										
X										
- Buttons:** [Save](#) [Done](#)

On the Roster Edit screen, the drop-down list on the top right field contains the new configuration file that was created and will be used for this upload. (If you do not see the new configuration file wanted, click on the drop-down menu's button and select it from the list). Fill in the Roster name with what the name of the school or class that is appropriate.

At this point, close the tab delimited file. **If the file is still open on your computer even if it's minimized, the file cannot be uploaded..** Now click on *Browse* and select the file.

Roster Edit

Roster Name: Import File: using

	Last Name	First Name	Middle	Dob	Gender	Mother Maiden	Address	City	State	Zip
x	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
x	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
x	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
x	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
x	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
x	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
x	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
x	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
x	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
x	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Now the Roster Edit screen will look like this. You have chosen a name for the roster, navigated to the delimited file with all the student information that you wish to upload (If you have an Excel file that contains your student data, you can select Save AS from the file menu and save as a tab delimited file.) and selected the configuration that was created earlier.

Now press the save button at the top of the screen.

https://cosda140t - SDIR 9.5 - School Roster Edit - Mozilla Firefox

SDIR PATIENTS ADMINISTRATION REPORTS LOGOUT

Immunization Reminder Export TB Batch

Roster Edit

Roster Name: SD HIGH SCHOOL Import File: Browse... using SD HIGH SCHOOL

Save Done

Last Name	First Name	Middle	Dob	Gender	Mother Maiden	Address	City	State	Zip
JONES	ANDY		08/29/2005	M		15433AA S N		CA	92404
Add new immunizations									
OPV <input type="text"/> +									
JONES	ASTON		08/30/2005	F		15433AA S N		CA	92404
Add new immunizations									
OPV <input type="text"/> +									
JONES	BAILEY		08/31/2005	F		15433AA S N		CA	92404
Add new immunizations									
OPV <input type="text"/> +									
JONES	MICHAEL		09/01/2005	M		15433AA S N		CA	92404
Add new immunizations									
OPV <input type="text"/> +									
JONES	LENNY		09/02/2005	M		15433AA S N		CA	92404
Add new immunizations									

Done cosda140t

Your data from the tab delimited file have now populated the Roster Edit screen. You may now review the data and press save to save the roster at the bottom of the screen or you may press “Done” to cancel the save. If you save the new roster will be added to the roster list and is available for selection.

SDIR PATIENTS ADMINISTRATION REPORTS LOGOUT

Immunization Reminder Export TB Batch

Roster List

[New Roster](#)

Date	Roster Name	# of Students	Worksheets	Forms	
07/21/2008	Chargers	5	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete
07/21/2008	MannyTEST	1	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete
07/21/2008	chargers2	15	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete
07/22/2008	Nancyschool	9	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete
07/22/2008	Lakers	17	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete
08/08/2008	SD HIGH SCHOOL	10	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete

File Formats

[New File Format](#)

Name	
SD High school	delete

Done cosda140t

Once the roster is complete, go to the bottom and click on “Merge Patients”.

This will make any shots in the registry that match the student information appear below or next to the student’s name.

Note: If any ‘new’ student records have never been entered in the registry, those records will be locked (closed to sharing) until a the student visits a provider that is using the registry and is informed that their record is in the registry. For students that already have a record in the registry, the sharing status of their record will not change.

SDIR 9.7 - School Roster Edit - FOR AUTHORIZED USE ONLY - Microsoft Internet Explorer

PATIENTS ADMINISTRATION REPORTS LOGOUT

Immunization Reminder Export TB

Save Done

When you are done building this roster, you may merge it with the registry.

Merge Patients

Whether the student roster has been uploaded or entered manually, merged shots will appear associated with the student. Immunizations that are not in the registry can be added manually.

SDIR 9.7 - School Roster Edit - FOR AUTHORIZED USE ONLY - Microsoft Internet Explorer

PATIENTS ADMINISTRATION REPORTS LOGOUT

Immunization Reminder Export TB

Roster Edit

Roster Name: MNK school Import File: Browse... using Southbay High School

Save Done

Last Name	First Name	Middle	Dob	Gender	Mother Maiden	Address	City	State	Zip
knickerbock	nancy		09/01/2006	f		123 sleepy s	san diego	ca	92110
Add new immunizations									
OPV									
HEP B									
Hep B-adol or ped 09/01/2006									
mones	manny		08/01/2006	m		123 happy st	san diego	ca	92211
Add new immunizations									
OPV									
POLIO									
IPV 12/01/2006									
DTP									
DTaP 12/01/2006									
HEP B									
Hep B-adol or ped 08/01/2006									
Hep B-adol or ped 12/01/2006									
ralston	kim		10/01/2006	f		123 downey	san diego	ca	92110
Add new immunizations									

State worksheets and forms can be generated out of the Roster List.

Roster List					
Date	Roster Name	# of Students	Worksheets	Forms	
07/21/2008	chargers	5	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete
07/21/2008	chargers2	14	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete
07/21/2008	MannyTEST	1	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete

When you click on the Child Care link in the "worksheets" column, it will generate this form.

State of California Health and Human Services Agency

California Department of Public Health

**WORKSHEET FOR THE ANNUAL IMMUNIZATION REPORT
ON CHILDREN ENROLLED IN CHILD CARE CENTER**

VACCINE DOSE SUMMARY		LIST ALL CHILDREN AGES 2 THROUGH 4 YEARS 11 MONTHS CHECK ONLY THE LAST DOSE OF EACH VACCINE RECEIVED																				
NAME OR ID	DOB	F/U	POLIO DOSES				DTP/TA DOSES				MM		HIB		HEP B				VARICELLA			
			0	1	2	3+	0	1	2	3	++	0	1+	0	1+	0	1	2	3+	0	1+	2+
banks, gary	01/01/2004	X	X				X					X	X	X	X					X		
brumlet, casey	01/01/2004	X	X				X					X	X	X	X					X		
cason, antoine	01/01/2004	X	X				X					X	X	X	X					X		
gordon, cletis	01/01/2004	X	X				X					X	X	X	X					X		
gregory, Steve	01/01/2004	X	X				X					X	X	X	X					X		
hester, jacob	01/01/2004	X	X				X					X	X	X	X					X		
janner, quentin	01/01/2004	X	X				X					X	X	X	X					X		
laeding, nate	01/01/2004	X	X				X					X	X	X	X					X		
mahee, legedu	01/01/2004	X	X				X					X	X	X	X					X		
oliver, paul	01/01/2004	X	X				X					X	X	X	X					X		
pittman, billy	01/01/2004	X	X				X					X	X	X	X					X		
rivers, philip	01/01/2004	X	X				X					X	X	X	X					X		
thomas, marcus	01/01/2004	X	X				X					X	X	X	X					X		
tomlinson, LaDahdan	01/01/2004	X	X				X					X	X	X	X					X		
Total all pages		14	14	0	0	0	14	0	0	0	0	14	0	14	0	14	0	0	0	14	0	

PRINT OPEN AS PDF OPEN AS EXCEL

You have the option to open in *PDF* or *EXCEL* and then be able to save the form.

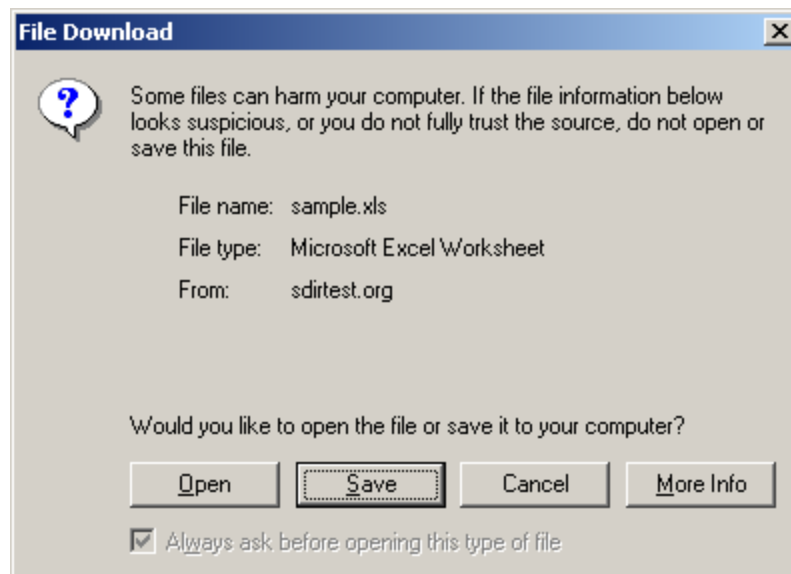
https://sdirtest.org/ReportExport?type=pdf - Microsoft Internet Explorer

File Edit Go To Favorites Help

Back Forward Stop Reload Home Search Favorites Media Print Mail

PDF Format.

If you chose to “OPEN AS EXCEL” it will give you this option. You can Open, Save, Cancel or More info.



Microsoft Excel - sample[1].xls

File Edit View Insert Format Tools Data Window Help

Type a question for help

san serif 10 B I U

Reply with Changes... Egd Review...

A1

State of California—Health and Human Services California Department of Public Health

**WORKSHEET FOR THE ANNUAL IMMUNIZATION REPORT
ON CHILDREN ENROLLED IN CHILD CARE CENTER**

VACCINE DOSE SUMMARY

LIST ALL CHILDREN AGES 2 THROUGH 4 YEARS 11 MONTHS
CHECK ONLY THE LAST DOSE OF EACH VACCINE RECEIVED

NAME OR ID	DOB	POLIO DOSES				DTP/tD DOSES				MMR		HIB		HEP B			A		EXEMPT				
		F-Up	0	1	2	3+	0	1	2	3	4+	0	1+	0	1+	0	1	2	3+	0	1+	med	pers
banks, gary	01/01/2004	X	X				X				X	X	X							X			
bramlet, casey	01/01/2004	X	X				X				X	X	X							X			
cason, antoine	01/01/2004	X	X				X				X	X	X							X			
gordon, cletis	01/01/2004	X	X				X				X	X	X							X			
gregory, Steve	01/01/2004	X	X				X				X	X	X							X			
hester, jacob	01/01/2004	X	X				X				X	X	X							X			
jammer, quentin	01/01/2004	X	X				X				X	X	X							X			
kaeding, nate	01/01/2004	X	X				X				X	X	X							X			
naanee, legedu	01/01/2004	X	X				X				X	X	X							X			
oliver, paul	01/01/2004	X	X				X				X	X	X							X			
pittman, billy	01/01/2004	X	X				X				X	X	X							X			
rivers, philip	01/01/2004	X	X				X				X	X	X							X			
thomas, marcus	01/01/2004	X	X				X				X	X	X							X			
tomlinson, LaDainian	01/01/2004	X	X				X				X	X	X							X			
Total all pages		14	14	0	0	0	14	0	0	0	0	14	0	14	0	14	0	0	0	14	0	0	0

KindergartenAssessmentWorkSheet

Ready NUM

View of “EXCEL” Format

When you click on the Kindergarten link in the “worksheets” column, it will generate this form.

SDIR 9.5 beta 1 - Search > Utility > Reports > Immunization > Kindergarten Assessment Work Shee - Microsoft Internet Explorer

Immunization Reminder Export TB Batch

State of California Health and Human Services Agency California Department of Public Health

KINDERGARTEN IMMUNIZATION ASSESSMENT WORK SHEET
(Do Not Send In)

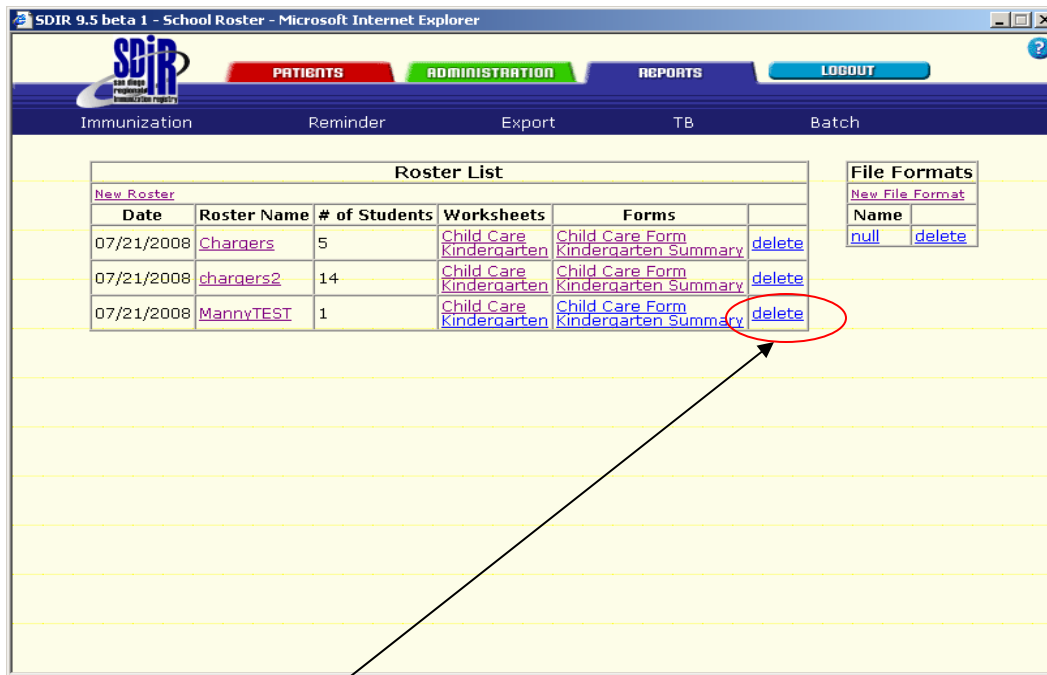
Each child should have either a check mark under UNCONDITIONAL ENTRANTS or check marks under CONDITIONAL ENTRANTS - never under both headings. (Use the Guide for Immunizations Required for School Entry to determine status.)

NOTE: The numbers and letters on these columns coincide with those on the SCHOOL SUMMARY SHEET.

NAME OR ID	UNCONDITIONAL ENTRANTS -- the child has:			Coul	CONDITIONAL ENTRANTS -- does not meet requirement for:							
	1. All Dates	2. PHE	3. PHE		4. Polio	5. DTP	6. MMR-1	7. A	8. MMR-2	9. Hep B	10. Unvacc	
banks, gary	X	X	X	X	X	X	X	X	X	X	X	
bramlet, casey	X	X	X	X	X	X	X	X	X	X	X	
cason, antoine	X	X	X	X	X	X	X	X	X	X	X	
gordon, cletis	X	X	X	X	X	X	X	X	X	X	X	
gregory, Steve	X	X	X	X	X	X	X	X	X	X	X	
hester, jacob	X	X	X	X	X	X	X	X	X	X	X	
jammer, quentin	X	X	X	X	X	X	X	X	X	X	X	
kaeding, nate	X	X	X	X	X	X	X	X	X	X	X	
naanee, legedu	X	X	X	X	X	X	X	X	X	X	X	
oliver, paul	X	X	X	X	X	X	X	X	X	X	X	
pittman, billy	X	X	X	X	X	X	X	X	X	X	X	
rivers, philip	X	X	X	X	X	X	X	X	X	X	X	
thomas, marcus	X	X	X	X	X	X	X	X	X	X	X	
tomlinson, LaDainian	X	X	X	X	X	X	X	X	X	X	X	
Total all pages	0	0	0	14	14	14	14	14	14	14	14	

PRINT OPEN AS PDF OPEN AS EXCEL

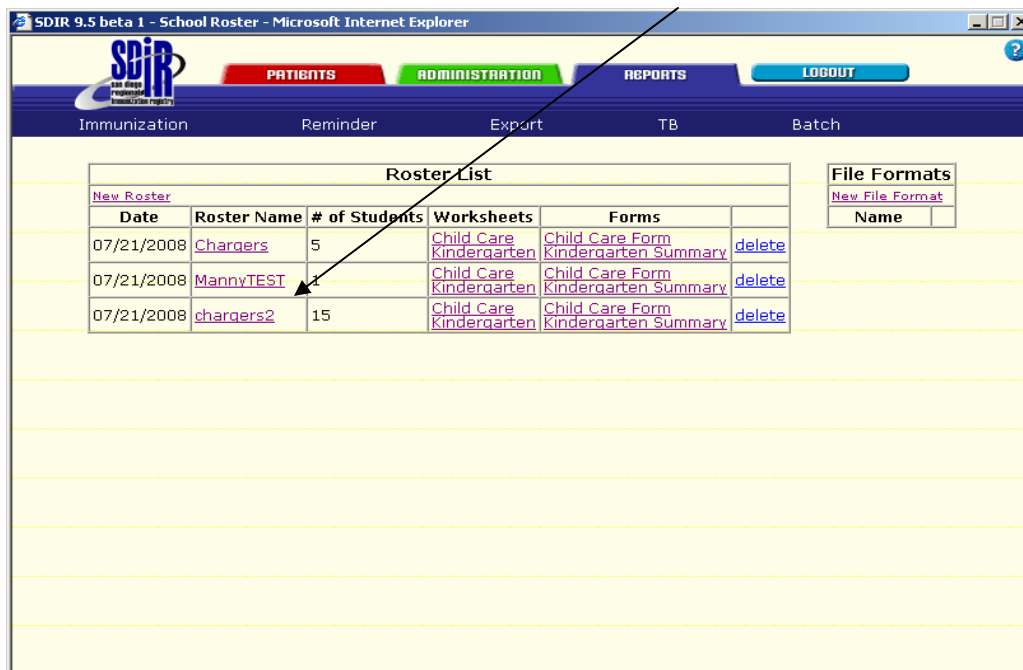
When you select the Child Care Form or Kindergarten Summary under the “Forms” field the appropriate State forms are generated.



To “Delete” a roster. Simply click the delete option.

To add or edit a saved roster:

- 1) Select the Roster Name- for this example, choose chargers2



2) To add new immunizations simply click on the “Add new Immunizations” drop down menu and add the date. Then click on the “+” button.

SDIR 9.5 beta 1 - School Roster Edit - Microsoft Internet Explorer

PATIENTS ADMINISTRATION REPORTS LOGOUT

Immunization Reminder Export TB Batch

Roster Edit

Roster Name: chargers2 Import File: Browse... using

Save Done

Last Name	First Name	Middle	Dob	Gender	Mother Maiden	Address	City	State	Zip
naanee	legedu	boise st	01/01/2004	U					
Add new immunizations									
			OPV						
MMR 01/01/2005									
banks	gary	troy	01/01/2004	U					
Add new immunizations									
			OPV						
pittman	billy	texas	01/01/2004	U					
Add new immunizations									
			OPV						
rivers	philip	NC State	01/01/2004	U					
Add new immunizations									
			OPV						

A vaccine dose of varicella has been added to the student record for

Last name: Nanee,

First name: Legedu .

Now that child has an MMR and a varicella recorded in the registry.

Note: To satisfy FERPA, the school must have a written consent to release student information prior to entering any personal or immunization data in the SDIR.

SDIR 9.5 beta 1 - School Roster Edit - Microsoft Internet Explorer

PATIENTS ADMINISTRATION REPORTS LOGOUT

Immunization Reminder Export TB Batch

Roster Edit

Roster Name: chargers2 Import File: Browse... using

Save Done

Last Name	First Name	Middle	Dob	Gender	Mother Maiden	Address	City	State	Zip
naanee	legedu	boise st	01/01/2004	U					
Add new immunizations									
			Varicella	01/01/2005					
MMR 01/01/2005									
banks	gary	troy	01/01/2004	U					
Add new immunizations									
			OPV						
pittman	billy	texas	01/01/2004	U					
Add new immunizations									
			OPV						
rivers	philip	NC State	01/01/2004	U					
Add new immunizations									
			OPV						

Click on Save. To exit the Roster Edit screen, click on **Done**.

Note: If this individual's record is new to the registry, you should click on the **Merge** button at the bottom of the page, to put this record into the registry database. The next time you search for the person, the record will be appear listed in the search results.

This will input the immunizations you just updated to the record in SDIR.

Search for patient in SDIR and verify that IZ has been updated.

SDIR 9.5 beta 1 - Search Page - Microsoft Internet Explorer

SEARCH DEMOGRAPHICS IMMUNIZATION SCREENINGS ACTIVITY LOG SAVE UTILITY LOGOUT

Admin | Akc Akc | Chula Vista Elementary School District | Chula Vista Elementary School

Reset

Advanced Search

Last: naan First: leg Middle: DOB: Mother Maiden: Gender: Med Rec #: starts with: SEARCH

Home Others Search Result NEW PATIENT

Last	First	Middle	DOB	M/E	Mother Name	M.Maiden	Med Rec #	Lnk
NAANEE	LEGEDU	BOISE STATE	01/01/2004	U			0	

Notice that the varicella vaccine dose added in the student roster also updates the patient record in SDIR.

Also, note that the new record is “locked” to sharing with other providers using the registry until the parent receives the disclosure information.

SDIR 9.5 beta 1 - Search > Immunization - Unique Only - Microsoft Internet Explorer

SEARCH DEMOGRAPHICS IMMUNIZATION SCREENINGS ACTIVITY LOG SAVE UTILITY LOGOUT

Admin | Akc Akc | Chula Vista Elementary School District | Chula Vista Elementary School

Reset

ALL RECORDS VALID RECORDS ONLY

2 Records (Unique Only) Confidential immunizations hidden!

Contraindications/Precautions Waivers Disease History Add Iz from History

Vaccine	Date	Dose	Body Site	Mfg	Brand Name	Lot #	VIS Date	Vaccinator	Other Provider
MMR	01/01/2005	1							
VARIC	01/01/2005	1							

PRINT PRINT CALIFORNIA IMMUNIZATION RECORD PRINT TO BLUE CARD

Vaccine Forecast Due 07/21/2008

IPV DTaP MMR Hib Hep B Varicella Hep A-child PCV 7

Next Due Date 07/21/2008

UPDATE

Monday

July 2008

S	M	T	W	T	F	S
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Here's a sample of a child's record that was entered through the school roster report and now is "Locked" or confidential. See the red Lock on the right of the name.

Click on "Change:" to edit the status.

https://www.sdirtrain.org - SDIR 9.8 - Search > Patient - FOR AUTHORIZED USE ONLY - Microsoft Internet Explorer

Admin | First Last | San Diego Unified School District | San Diego Unified School District
THIRD, STUDENT | 06/12/2005 | 4 years 3 months |

IPID - 592875 Record ID - 8204134 * Required Fields

Last * First * Middle Gender * DOB * Verify *
 Address Address 2 City State Zip Bad Address
 Phone 1 Contact 1 Multiple Births Birth State Ethnicity Language
 Mother Last Mother First Mother Middle Mother DOB Mother SSN Maiden Name
 WIC ID Facility Reminder Status VFC
 Date Modified: 09/18/2009 [Confidential: Y as of 01/01/1900] [CHANGE](#) Home Record: [Archive](#) | [Link](#) | [Unlink](#) | [Sibling](#) | [Show Iz](#) | [Print](#)

No Duplicate Records to Display

Click "Yes" to change the patient confidential-status

Change Patient Confidential Status

Are you sure you want to change the Patient Confidential Status from Y to N?

The 'lock' will be removed and thereby, all authorized users when a successful search is made for this record, will be able to see the demographic information and the immunization record.

https://www.sdirtrain.org - SDIR 9.8 - Search > Patient - FOR AUTHORIZED USE ONLY - Microsoft Internet Explorer

Admin | First Last | San Diego Unified School District | San Diego Unified School District
THIRD, STUDENT | 06/12/2005 | 4 years 3 months

IPID - 592875 Record ID - 8204134 * Required Fields

Last * First * Middle Gender * DOB * Verify *
 Address Address 2 City State Zip Bad Address
 Phone 1 Contact 1 Multiple Births Birth State Ethnicity Language
 Mother Last Mother First Mother Middle Mother DOB Mother SSN Maiden Name
 WIC ID Facility Reminder Status VFC
 Date Modified: 09/18/2009 [Confidential: N as of 09/18/2009] [CHANGE](#) Home Record: [Archive](#) | [Link](#) | [Unlink](#) | [Sibling](#) | [Show Iz](#) | [Print](#)

No Duplicate Records to Display

How to Produce the CHDP Annual School Report

Parents or guardians of children entering school are required by California State law to provide their child's school with documentation of a health examination (HE). Schools are required to collect forms for each child, and then place the form in the child's permanent record. Schools track the number of students who received a HE and report these numbers to the County of San Diego CHDP Program and the San Diego County Office of Education, respectively.

Note: The CHDP Health exam results can be entered in the school roster format in the same way that immunizations are entered into the roster. This section presents the 2nd option for entering results.

This option for entering the date and results of the CHDP Annual Health Exam is to search for a child's record. If no record is found, then create a new record. Enter demographic information and save.

Last	First	Middle	DOB	M/F	Mother Name	M Maiden	Med Rec #	Link
MOU	MIC		04/14/1998	U			0	
MOU	MIC		05/20/2000	U			2	
MOU	MIC		05/20/2005	U			3	
MOU	MIC		11/02/1999	M			6	
MOU	MIC		03/01/2004	U			1	
MOU	MICHELLE		03/14/1990	F	MOUSEY, MARIAN		3	
MOU	MIC		09/11/1998	U			3	
MOU	MICKEY	FETE	12/12/2002	U	MOM, MISSY	goddy	4	
MOU	MIC		03/04/2004	M			0	
MOU	MIC		06/11/2000	U			0	
MOU	MIC		06/25/1997	U			0	
MOU	MICHELLE		01/01/2004	F	Johnson, Kai		3	

Click on the Screenings Tab and then on the Health Exam.

Click on "Add New Health Exam" to enter new information.

Enter the Exam date.

If appropriate, click on the waiver. Enter any additional notes. Click on the insert button.

The screenshot shows the 'Health Exam' form in the SDIR system. At the top, there are navigation tabs: SEARCH, DEMOGRAPHICS, IMMUNIZATION, SCREENINGS, ACTIVITY LOG, SAVE, UTILITY, and LOGOUT. Below the tabs, the user information is displayed: View Only | Nancy Knickerbocker | Sweetwater Union High School Dist | Chula Vista Middle School | MOU, MIC | 05/20/2000 | 9 years 2 months. A 'RESET' button is located to the right. The main heading is 'Health Exam'. Below this, there are links: 'Back to Screening Page' and 'Add new Health Exam'. A message states: 'There is no Health Exam data available for the patient selected'. At the bottom, there is an 'INSERT' button and a 'CANCEL' button. Below these buttons are input fields for 'Record Date' (07/22/2009), 'Exam Date', 'Waiver' (with options: Does not want, Unable to obtain, No reason provided, and No Documentation of HE), and a 'Notes' text area.

The information will be saved on the main Health Exam page.

The screenshot shows the 'Health Exam' form after the information has been saved. The 'INSERT' button has been replaced by an 'UPDATE' button, along with 'DELETE' and 'CANCEL' buttons. Below these buttons is a table with the following data:

Record Date	Exam Date	Waiver
07/22/2009	07/15/2009	No Waiver

Below the table, there are input fields for 'Record Date' (07/22/2009), 'Exam Date' (07/15/2009), 'Waiver' (with options: Does not want, Unable to obtain, No reason provided, and No Documentation of HE), and a 'Notes' text area. The 'edit' link is now visible next to the first row of the table.

Once the health exam results have been entered for a group of children, then go to the Utility Tab and click on the Report Tab.

Select the Report Type: CHDP Annual School Report.

Enter the correct School Year Start Date.

Look at the Roster list to see if the Roster file for that class already exists. If the correct roster is on the list. **Click** once to highlight that specific roster. Then click on the “Get Report” button.

Be patient! It may take a minute or two for the report to be generated.

Click in a box that is not pre-filled to type in and complete form.

Remember that the data that was typed-in, cannot be saved on the form, so print out a copy for your records.

How to Produce the Oral Health Report

Note: The Oral Health exam results can be entered in the school roster format in the same manner as immunizations are entered. This section presents the 2nd option for entering results.

Under Health Screenings, select Oral Health Exam.

The screenshot shows the SDIR 9.8 web application. The top navigation bar includes links for SEARCH, DEMOGRAPHICS, IMMUNIZATION, SCREENINGS, ACTIVITY LOG, SAVE, UTILITY, and LOGOUT. The main content area is titled 'Health Screenings' and lists several options: Height and Weight, Tuberculosis, Lead Screening History, Health Exam, and Oral Health Exam. The 'Oral Health Exam' button is highlighted in orange.

Enter the information in the Results and Recommendations.

Note: If entering “No Obvious Problem” in the Results, then enter “Early Care Needed” under Recommendations.

When completed, click on “Insert”.

The screenshot shows the 'Oral Health Exam' form in the SDIR 9.8 application. The form includes fields for Record Date (07/22/2009) and Exam Date. Below these are checkboxes for Results (Visible Decay/Fillings Present, Visible Decay/Untreated Decay, No Obvious Problems, Early Care Needed) and Recommendations (Urgent Care Needed, Form Incomplete). There is also a Waiver section with radio buttons for Unable to obtain, Cannot afford, Does not want, Other, No reason provided/Form Incomplete, and No Documentation of Oral HE. The 'Insert' button is highlighted in green.

The summary screen will show the entered results. Note that the Results summary also contains the Recommendation.

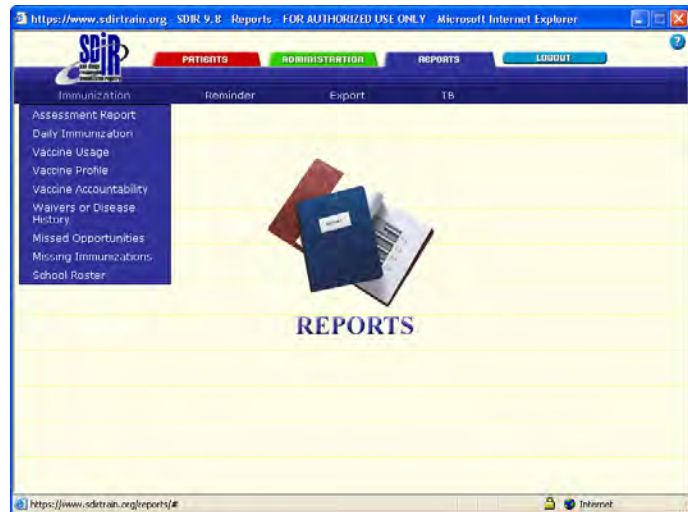
The screenshot shows the 'Oral Health Exam' summary screen in the SDIR 9.8 application. It displays a table with the following data:

Record Date	Exam Date	Results	Waiver
07/22/2009	07/15/2009	No Obvious Problems, Early Care Needed	No Waiver

Below the table, there is a section labeled '** Insert/Update/Delete Area **'.

Once all the results of the Oral Health exam are entered, a Oral Health Report can be produced. Go to Utility Tab, and Click on Reports.

Scroll down to the School Roster. →



Select the Report Type: Oral Health Report.

Click **once** on the Roster name to highlight the report. →

Roster List					File Formats	
Date	Roster Name	# of Students	Worksheets	Forms		
01/20/2009	Mrs. Smith 11th grade	1	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete	
03/13/2009	MNK school	3	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete	
03/13/2009	Test School	0	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete	
09/09/2009	Minnie Mouse	1	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete	
09/18/2009	D.Duck kindergarten	3	Child Care Kindergarten	Child Care Form Kindergarten Summary	delete	

The Oral Health Report will compile data —counts of exams and the results as well as the rates, needed for reporting to the State.

SDIR 9.8 - Search > Utility > Reports > Immunization > Oral Health Summary - FOR AUTHORIZED USE - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://www.sdirtrain.org/reports/roster/oralhealth.jsp> Go Links Convert Select

SDIR PATIENTS ADMINISTRATION REPORTS LOGOUT

Immunization Batch Reminder Export TB Admin

Oral Health Examination Summary Report

School District: Sweetwater Union High School Dist

Reporting Year: 09-10

School Year	Students with Requirements			Assessment Outcomes							Waivers						
	Total Enrolled Students	Total Times Outlined with Requirements	Total Violations of Students with Requirements	Assessments Completed	Carex Suspension	Visible Decay	No Obvious Problems	Early Care	Urgent Care	Waiting for Exam	Qualifies for Seal and Fluoride	Can not Seal	Other	No Fluoride	Total Waives	No Documentation	
Summary	2	0	2	2	1	1	1	1	1	1	0	0	0	0	0	0	0
Total	2	0	2	2	1	1	1	1	1	1	0	0	0	0	0	0	

Calculated Compliance Values

Compliance Rate: 100.00%

Waiver Rate: 0.00%

Assessment Outcome Rates

Rate of Urgent Care Needed: 33.33%

Rate of Early Care Needed: 33.33%

Rate of No Obvious: 33.33%

Rate of Visible Decay: 33.33%

Rate of Carex Suspension: 33.33%

PRINT OPEN AS PDF OPEN AS EXCEL DONE

Done Internet

School Report Questions and Answers:

Q. What happens in the data entry or upload of batch records for schools when two or more records have the same names and birth dates?

A. As with any new patient records that will be added to the registry, the most important activity is to make sure that a record for this individual does not already exist in the SDIR. So, when the registry matches records with same first name, last name, and DOB, the application would handle the process by linking the records together. Any records that the application cannot match because it does not have enough information will be put into the Manual Verification section of the registry which is only open to Administrative users. Call the SDIR Help Desk at (619) 692-5656 for assistance.

Q. Why is a new immunization record in SDIR marked as confidential (not to be shared with other providers on the registry) when they are entered through the school roster report functionality?

A. When a new record is entered in the registry through the school roster report, the SDIR will automatically mark the record as confidential so safeguard student personal health information. If the user has obtained a signed parental consent, then the user will be able to change the child's confidentiality status in SDIR. The default confidential date is 1/1/1900 so that if the record matches one already in the system which is not marked confidential, the confidentiality status of the existing record in SDIR will not be changed.

Q. Why won't my tab delimited file upload into the School Roster Report?

A. First, make sure that the **tab delimited file that you want to upload into SDIR is closed on your computer screen**. If it is open, it can't be imported. Then, check the order of the tabs in the file and make sure that fields are numbered correctly in the Roster File Configuration.

Q. Why won't the child's information appear on either the CHDP or the Oral Health reports?

A. The Record Date for the Health or Oral Exam must fall between the start and end dates for the roster.

Call the SDIR Help Desk at (619) 692-5656 if you have other questions, need more information or assistance.